Mobility Online Manual 'Courses abroad' Backoffice

Content:

1.   Complete process of courses abroad

Mobility Online is based on so-called workflows (for the applicant) and pipelines (for the backoffice). Per application 1 workflow, per pipeline many applications.

For 'courses abroad' the pipeline actually consists of 2 parts: the application starts in the pipeline *Courses abroad*, and after a scholarship application has been processed, the pipeline continues into one of the following 4 pipelines: *Courses abroad - Erasmus (SMS)*, *Courses abroad - Holland Scholarship*, *Courses abroad - Twente Mobility Fund* or *Courses abroad - no scholarship*. Each pipeline consistes of several sections, which will be discussed in this document.

Depending on the settings the user who has the function of 'Departmental Coordinator' in Mobility Online can see one or more education programmes (in Mobility Online: 'Study fields').

Note that within different eduational programms at the UT, similar actions are being performed by different members of staff. Therefore, in this manual *the term **BO (Back office Officer)** is used to indicate either exchange coordinator, programme coordinator, member of exam committee, member of the Student Administration, etc*.

1.1.   Summary

The complete workflow / pipeline for *courses abroad* in Mobility Online can be summarised as follows:

Before Mobility - pipeline 'Courses abroad'

applicant	back office (BO = staff member in the faculty, IO = staff member of International Office)
- fills in an online application form for courses abroad, indicating 3 till 6 preferred destinations	
	- BO acknowledges (= confirms) the application in Mobility Online - BO/IO executes the selection procedure - BO allocates the selected partner university to the applicants in Mobility Online
- accepts (or rejects) the application in Mobility Online - confirms the begin and end date of the exchange period in Mobility Online	
	- BO checks and confirms the begin and end date of the exchange period in Mobility Online
- fills in the courses (s)he wants to do at the partner university in Mobility Online - downloads this list of ourses as pdf - has this list of courses signed by the approprioate person in the educational programme (the job function of this person or entity differs per programme) - uploads the signed document into Mobility Online	
- applies at the partner university, according to the rules of the partner - receives acceptance (or rejection) from the partner - confirms 'accepted by the partner' in Mobility Online	

applicant	back office (BO = staff member in the faculty, IO = staff member of International Office)
	- BO checks that the uploaded list of courses is signed indeed - BO checks acceptance and marks the application as 'approved' - BO: if the list needs corrections (or something else needs correction), this can be notified to the applicant within Mobility Online; the application will be labeled 'incomplete'.
- applies for scholarship and answers some related questions in Mobility Online	- IO checks the answers and allocate the application to one of the continuing pipelines (see introduction to this Manual)
if the student wants to cancel his/her application at any time and/or the partner university rejects ths application, then this should all be communicated via and check marked within Mobility Online.	

Before Mobility - pipeline 'Courses abroad - Erasmus (SMS)'

applicant	back office (BO = staff member in the faculty, IO = staff member of International Office)
- deals with some steps in Mobility Online related with the scholarship procedure: fills in address & bank details , answers some more questions , uploads signed Learning agreement (required by Erasmus rules)	- IO approves (or asks for corrections on) Learning agreement and calculates the scholarship,
- downloads Grant agreement, has this signed by the coordinator, uploads the signed document in Mobility Online (required by Erasmus rules) and executes (if appropriate) the Online Linguistic Support questionaire	- IO checks all this …

During Mobility - pipeline 'Courses abroad - Erasmus (SMS)'

applicant	back office (BO = staff member in the faculty, IO = staff member of International Office)
- fills in the address during the exchange period in Mobility Online - fills in the expected return date in Mobility Online - notifies the system if any changes occur and if so, what those changes are; in Mobility Online	- IO approves any changed learning agreement (especially related to the scholarship calculations) (Note DB: changes in the course list will probably have to be checked with the coordinator! To be checked with implementation working group.)

After Mobility - pipeline 'Courses abroad - Erasmus (SMS)'

applicant	back office (BO = staff member in the faculty, IO = staff member of International Office)
- uploads ToR in Mobility Online	
	- IO approves ToR; if the list needs corrections, this can be notified to the applicant within Mobility Online
- sends required deliverables, according to the rules of the own educational programme (Q1: which deliverables are required? Q2: to whom should the student sent those deliverables?) - marks the deliverables as being sent in Mobility Online	
	- IO or BO (to be determined) confirms deliverables as 'received' in Mobility Online - IO pays out last installment of scholarship - BO confirms exchange periode as being 'finished' in Mobility Online

1.2.   The rest of this manual

In the following chapters and paragraphs the different pipelines / workflows and steps as defined in Mobility Online will be explained in more detail.

If the title of a step starts with: "***Step applicant:*** " it means that the applicant should perform this action. The steps wich have to be dealt with by a member of staff ('back office officer' … see introduction to this chapter) start with a simple "***Step:*** "

To make it easier to find the actual action to be done amids the explanation around it, the description of this action is emphasised with the icon   in the margin.

1.3.   Looking ahead towards the end

Note: one of the procedural aspects of the exhange process that has not been dealt with (yet): how to communicate the approved ToR (including possible changes during the mobility) with the Student administration (BOZ).

2. Pipeline: courses abroad

The pipeline Courses abroad (i.e. without a scholarship indication) takes place before the mobility has started. The following 5 sections can be distinguised (indicated in red):

⊟ **Outgoing**	**Total (677)**
⊟ **Courses abroad**	**Total (269)**
⊟ 2017/2018 ↻ Open all sub groups	**Total (265)**
⊞ **Before the mobility - Application form**	**Total (12)**
⊞ **Before the mobility - Learning Agreement/Proposal Form**	**Total (250)**
⊞ **Before the mobility - Scholarship questions**	**Total (0)**
⊞ **Before the mobility - Applications rejected by students**	**Total (3)**
⊞ **Before the mobility - Students rejected by partner**	**Total (0)**
⊞ **General queries**	**Total (265)**

Note that the pipeline and its sections can be fold out (click on '+') or collapsed (click on '-').

> Tip 1 : click on Open all sub groups to get an immediate overview of all steps in the pipeline
>
> Tip 2: click on the button **Show active steps only** (top richt of the screen), to see only those steps which contain applications.

2.1. Section: Before the mobility - Application form

⊟ **Before the mobility - Application form** ↻			**Total (12)**
⬅ New Applications - not yet registered	**(0)**		ⓘ
➡ New application – check application form	**(12)**	Check application and send confirmation e-mail to student	ⓘ

> Notes in general:
> - a green arrow indicates that there are applications in this step. A white arrow indicates there are not.
> - after the arrow the name of the step is given
> - the number between brackets shows the number of applications in this step
> - the underlined text is a so-called action link.
>   - If the underlined text starts with 'Display ...', then the applications in that step are for your information only; no action needs to be done.
>   - the other action links do ask for an action performed by someone in the backoffice.
> - the question mark might contain a help text, but this is not fully implemented yet.

Step: New applications - not yet registered

After a student has submit a new application, the system automatically registers this, therefor the number should always be '0'.

The registered application is automatically moved to the next step, while the student filling the application has received a confirmation of his/her registration in Mobility Online.

Step: New applications - check application form

In the example above it can be seen that there are 12 new applications for *Courses abroad* in the system. **The BO needs to acknowledge the applications in Mobility Online.** This is done by sending a confirmation email to the student.

ACTION

Action: Click on the action link (Check application …) which will bring up the list of the new applications:

Students/Interns/Applications/Applications outgoing	Check application and send confirmation e-mail to student ↓

Back to the application overview	Check application and send confirmation e-mail to student

Preselection

Type of application	○ Incoming ● Outgoing
Type of person	● Student ○ Teacher / Staff
Program	Courses abroad ▼
Academic year	2017/2018 ▼
Applicant is registered	● Yes ○ No
Confirmation e-mail for examination	○ Yes ● No

	Last name, First name, Degree	Date of birth	Program	Study field	Home.Inst.	Host.Inst.	Academic year	Stay from	Stay until	
✉ 🔍	Baars, Laurens	03/10/1993	Courses abroad	Industrial Engineering and Management	ENSCHED01	CARDIFF01	2017/2018	01/09/2017	31/01/2018	☐
✉ 🔍	Janbroers, Jamie	29/10/1996	Courses abroad	Electrical Engineering	ENSCHED01	STAVANG01	2017/2018	01/09/2017	31/01/2018	☐

At the bottom of the list you will see:

	Last name, First name, Degree	Date of birth	Program	Study field	Home.Inst.	Host.Inst.	Academic year	Stay from	Stay until	
	Tester	99	abroad				8	17	18	
✉ 🔍	Teststudent 150, Tester	20/09/1999	Courses abroad	Computer Science	ENSCHED01	ECOLE TECH	2017/2018	01/02/2018	31/08/2018	☐
✉ 🔍	van Harten, Thom	02/03/1997	Courses abroad	Mechanical Engineering	ENSCHED01	BORAS01	2017/2018	01/09/2017	31/01/2018	☐

	12 Records found!	☑ ☐ ↑

Back to the application overview	Check application and send confirmation e-mail to student

To confirm an application, check off the little box at the right of the concerned application and click on the button *Check application and send confirmation email to student*. After having done so, the concerned application will disappear from this list towards the next step in the workflow (student) and pipeline (back office), and the confirmation email is sent to student.

However, befóre this is done, other actions could be done first:

- hover above the email-icon and find three options being offered:
    - *Show email preview* - shows the text of the confirmation email, exactly as it will be sent after clicking the button *Check application and send confirmation email to student*.
    Click on the button *Close* to go back to the list of applications.
    - *Send email to this address* - this will open the default email-programme of the user, and a 'normal' email can be sent. This email will NOT be stored in Mobility Online, but can be found in the usual Sent mailbox of the user.
    - *Send email based on email template* - this will open the same email as shown in the *Show email preview*, but in an editable window. In orther words, both subject and text of the email can be changed at will. The sender ('no-reply') and recipient (applicant) cannot be changed, but other email-addresses can be added in the cc: or bcc: fields. It is also possible to add an

attachment.
After clicking the button *Check application and send confirmation email to student* the personalised email is sent to the student and the window returns to the list of applicants (minus this specific application).

- click on the magnifying-glass-icon to go to the applicant's workflow.

- click on the applicant's name to go to the so-called master data of the applicant[1]. The M*aster data* tab contains all fields of an application (regardless if they are already filled or still empy); the *Pipeline* tap contains the single pipeline of this application. After the check, click on the button *Cancel* to go back to the list of applicants.
This action is recommended to perform in order to check the application, before checking off the application and clicking on the button *Check application and send confirmation email to student* as described above.

> Tip 3: As long as there are applications in the list, the small icons at the bottom can be used to export the shown data into a file of pdf, rtf, xml, xls or csv format (icon 2 till 6). The 7th icon will export all fields of all shown applications into an xls-document.

After having executed this step for all concerned applications, go back to the overall pipeline by clicking on the button *Back to the application overview*.

2.2. Section: Before the mobility - Learning agreement / Proposal form

Before the mobility - Learning Agreement/Proposal Form			Total (250)	
Confirmation e-mail was sent - The host institution has not been allocated yet	(230)	Allocate the institution selected by the lot		
Host institution has been allocated - Institution not yet accepted/rejected by the student	(10)	Display applications		
Institution accepted by the student - End and start date not yet entered by the student	(6)	Display applications		
Start and end date filled out by the student - Applications not yet checked by the coordinator	(1)	Confirm accepted applications		
Applications checked by the coordinator - Learning Agreement not yet filled out by the student	(0)			
Learning agreement filled out by the student - Signed Learning Agreement not yet uploaded	(0)			
Signed Learning Agreement uploaded - Learning Agreement not yet approved by the coordinator	(0)			
Learning Agreement form uploaded - Learning Agreement not yet marked as rejected by the coordinator	(0)			
When incomplete: E-mail sent to the student - Learning Agreement not yet corrected by the student	(1)	Display applications		
When incomplete: Learning Agreement not yet corrected by the student - Learning Agreement not yet marked as approved	(0)			
When incomplete: Learning Agreement not yet corrected by the student - Learning Agreement not yet marked as incomplete again	(0)			
Learning Agreement approved by the coordinator - Courses not yet signed by the coordinator	(2)	Sign courses		
Courses signed by the coordinator - Acceptance by partner university not yet confirmed by the student	(0)			
Student accepted by the partner university - Study abroad not yet approved	(0)			

The next step in the workflow / pipeline is also to be executed by the BO.

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[1] See "Appendix - Application data"

Step: Confirmation e-mail was sent - The host institution has not been allocated yet

In this step **the allocation of one of the preferred partners to the application has to be done**. The student has choosen a minimum of three and a maximum of six universities. Any kind of system to find the optimal solution to a 2D optimisation problem (applicants vs. partner universities) has currently to be done outside Mobility Online. Once the optimum distribution of partner universities among the interested applicants has been determined, the allocation of those partner universities will be done in this step.

Action: Click on the action link <u>Allocate the institution selected by the lot</u>. A list will appear, similar to:

The effects of clicking on the magnyfying-glass-icon or on the name is the same as before.

The search box in the top-right can be used to select all applications including the institution you type here. The other three searchboxes can help you find a particular student, all students of a particular Study field or a specific number of months.

The allocated partner university should be dragged to the first position, next to the applicant's name. After this is done, check off the little square to the far right of the line (if the computer screen isn't big enough, you might have to move the contents of the window to the left untill the little box becomes visible).

Once you have checked off all the applicants concerned, you can click on the button *Send confirmation email*. All the checked off applicants will receive the confirmation email and move to the next step in the workflow (student) and pipeline (back office) Those applications which are not checked off will not be affected.

Note: if you click on an applicant's name in order to check the master data of this applicant and subsequently come back to the list of applicants, you will loose any selection you might have made and any checks you might have set.

Tip 4: if you hover above the word 'Details' right below a university's name, you can see more information regarding the availability of places, e.g.:

Country	Portugal (PT)
Name of institution	IST - Técnico Lisboa (University of Lisbon)
Institution code	LISBOA0109 (P LISBOA0109)
Bilateral agreement	**Show details**
Semester	1st semester

Persons	Target	Applications	Allocated	Free
Total number	2	2	0	2
First cycle/Bachelor/Undergraduate/Bachelor	0	1	0	0
Second cycle/Master/Postgraduate	2	1	0	2
Third cycle/Phd/Doctoral	0	0	0	0

months	Target	Applications	Allocated	Free
Total time	20.0	10	0	20.0
First cycle/Bachelor/Undergraduate/Bachelor	0	5	0	0
Second cycle/Master/Postgraduate	20.0	5	0	20.0
Third cycle/Phd/Doctoral	0	0	0	0

This can help you to quickly allocate the less popular partner universities.

After having executed this step for all concerned applications, go back to the overall pipeline by clicking on the button *Back to the application overview*.

Step applicant: Host institution has been allocated - Institution not yet accepted/rejected by the student
Step applicant: Institution accepted by the student - End and start date not yet entered by the student

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Step: Start and end date filled out by the student - Applications not yet checked by the coordinator

ACTION

Action: Click on the action link <u>Confirm accepted applications</u>. A list will appear, similar to as described with the step ***New applications - check application form***. The action to be performed here is similar to what is described in that paragraph.

There is a small difference in the effect of the email-icon to the left of an applicant's name. Now there is no choice: clicking on the email-icon will open an email-editor in Mobility Online. The recipient is still fixed, but the sender can now be changed to any address; by default it is the coordinator's address. Subject and text are by default empty. A choice has to be made regarding the use of a greeting and of a signature. Finally, again an attachment can be included. The email will be stored in Mobility Online.

Step applicant: Applications checked by the coordinator - Learning Agreement not yet filled out by the student

Step applicant: Learning agreement filled out by the student - Signed Learning Agreement not yet uploaded

[… to be continued …]

Signed Learning Agreement uploaded - Learning Agreement not yet approved by the coordinator

Learning Agreement form uploaded - Learning Agreement not yet marked as rejected by the coordinator

Step applicant: When incomplete: E-mail sent to the student - Learning Agreement not yet corrected by the student

When incomplete: Learning Agreement not yet corrected by the student - Learning Agreement not yet marked as approved

When incomplete: Learning Agreement not yet corrected by the student - Learning Agreement not yet marked as incomplete again

Learning Agreement approved by the coordinator - Courses not yet signed by the coordinator

Step applicant: Courses signed by the coordinator - Acceptance by partner university not yet confirmed by the student

Student accepted by the partner university - Study abroad not yet approved

2.3.   Section: Before the mobility - Scholarship questions

Before the mobility - Scholarship questions			Total (0)
Study abroad approved - Scholarship questions not yet answered	(0)		
Scholarship questions answered - Exchange programme not yet allocated automatically	(0)		
Scholarship questions answered - Exchange programme not yet allocated manually	(0)		

2.4.   Section: Before the mobility - Applications rejected by students

Before the mobility - Applications rejected by students			Total (3)
Applications cancelled by students - Infomail not yet sent	(2)	Send Infomail	
Infomail sent to students who cancelled	(1)	Display applications	

2.5.   Section: Before the mobility - Applications rejected by partner

Before the mobility - Students rejected by partner ⟳		Total (0)
⇨ Students rejected by partner - Infomail not yet sent	(0)	ⓘ
⇨ Infomail sent to students rejected by partner	(0)	ⓘ

TO BE CONTINUED …

3.   Appendix: Application data

There are different ways to find all data of an applicant:

- via the concerned pipeline; you would have to know if which pipeline the applicant is, though

- via the "Quick search" search field in the top of the Mobility Online window: type in studentnumber or (part of) the first or last name, and look in the results under 'Applications details'.

The following information is shown regarding the applications which are found:

Figure A.1

Suppose the name is not completely known and the list of records found is quite extensive, then the number of records can easily be limited by using the *Search field* now visible above the "Stay from" text. By typing in some text, the columns of 'Last name', 'Program', 'Study field', 'Host.Inst.' and 'Academic year' are searched for matches to this text.

At the bottom of this list of Applications you can find some export buttons:

Figure A.2

The 9 pieces of data (as shown in figure A.1) can be exported into a file of pdf, rtf, xml, xls or csv format.

In the list of applicants, 3 or 4 symbols are visible to the left of the name:

- Click on the ***magnifying-glass-icon*** to go to the applicant's workflow (see section 3.1)

- Click on the ***email-icon*** to send an email to the applicant, based on an email-template within Mobility Online (see section 3.2)

- Click on the ***'folder'-icon*** to "forward the application to the questionaires" (??) (see section 3.3)

- Click on the ***icon with the little green arrow*** to go to the 'Upload and manage documents' section of the applicant (see section 3.4)

- Click on the ***name of the applicant*** to go to the master data and other information regarding this application (see section 3.5)

3.1.   Applicant's workflow

If the BO needs to change something in the application, it is usually more convenient to go to the concerned form in the workflow, rather than changing anything in the so-called master-data of the application. For instance: if the applicant has applied in the wrong academic year, go to the workflow, click on the Action link' Edit application', change the academic year and save the changes.

In general, obviously, the worflow is for the applicant, so the BO should not edit too much …

3.2.   Email

The recipient is fixed (this is the applicant), but everything else can be changed at will: the sender, optionally other email-addresses in the cc: or bcc: fields, the subject, the contents, the signature. It is also possible to add an attachment.
After clicking the button *Create serial e-mails* the email is sent to the applicant and stored in the applicant's mail-tab (see further on).

3.3.   Questionaires

Some of the workflow steps are so-called 'questionnaires', which means that after this step the workflow goes in one direction or the other. Such step is always a 'create'-step, rather than a 'changing or editing information'-step. An example is the question: Do you want to apply for a scholarship? If 'yes', then some more questions appear, which do not appear if the answer is 'no'.

All questionnaires which the applicants has already dealt with are shown after clicking on the 'folder'-icon.

3.4.   Upload and manage documents

In this section you will find any document which has been uploaded to the applicant's archive by either the applicant or the BO, e.g.:

		Upload name ⇕	Owner ⇕	Filename ⇕	Created by ⇕	Created on ⇕	Modified by ⇕	Modified on ⇕
📄 🗑 🔍 ☑		Grant Agreement	Teststudent 146 - Tester	Grant_agreement_for_s tudies_and_traineeships _2_97_1_2_.doc	termeer	Apr 28, 2017 08:20:25		
📄 🗑 🔍 ☑		Learning Agreement for Traineeships	Teststudent 146 - Tester	Learning_Agreement_B efore_the_Mobility_Twe nte_97_2_.doc	termeer	Mar 29, 2017 13:44:32		
📄 🗑 🔍 ☑		Proposal form Courses abroad	Teststudent 146 - Tester	Planned_course_list_1.2 _2_.pdf	termeer	Feb 28, 2017 10:02:11		

Tools/Upload Centre Display all

A B C D E F **G** H I J K **L** M N **O** P Q R S T U V W X Y Z

First ◁ Previous (1 - 3 of 3) Next ▷ Last

Back to the application overview

With the small icons at the bottom the shown information can be exported into a file of pdf, rtf, xml, xls or csv format (icon 3 till 7). Additionally, all or selected documents can be printed (8th icon), archive in a zip-file (9th icon), exported as (one) pdf-file (10th icon). The final (11th) icon seems to initiate a print-action as well.

3.5.   Master data

The complete applicant's dossier consists of several tabs, which appear after specific steps in the workflow/pipeline.

Applications outgoing (ID = 593389)		Enable tool icon				Display

Cancel   Edit

Master data | Personal details | Scholarship | Pipeline | Course list filled out | Documents (1) | Notes (0) | Emails (5)

Master data

This tab shows all accessible fields with information regarding the application. Depending on where the applicant is in ths process, some of the fields might not have a value yet.

Personal details

This tab will appear after the applicant has filled in some personal details as the address during the mobility (part of the so-called notification form) and/or bank details (necessary to receive a scholarship).

Scholarship

This tab will appear if the application is moved to a 'scholarship'-pipeline, and shows (a.o.) the amount of scholarship

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Pipeline

This tab shows the pipeline of this application only. A quick way to find out where the applicant is in the workflow/pipeline, especially if it is very likely that the BO has to perform an action.

Course list filled out

This tab will apear after the applicant has filled out at least one course.

Documents

This tab shows the documents uploaded by either applicant (or BO).

Notes

This tab shows the Notes defined for this applicant/application by the BO.

Emails

This tab shows the emails sent to the applicant from within Mobility Online.